

CALIFORNIA ENERGY COMMISSION1516 NINTH STREET
SACRAMENTO, CA 95814-5512

September 1, 2006

TO: INTERESTED PARTIES

SUBJECT: REQUEST FOR PROPOSALS (RFP) # 400-06-401 **Addendum #1****Notice is Hereby Given That The Above RFP Is Amended As Follows****Table of Contents, page ii, Section III - Proposal Format and Required Documents is amended as follows (see attached revisions in underline/strikethrough):***Volume 2, Sections 1 and 2 titles have been revised to reflect corrections on pages 11 and 14 of the RFP.***Section I, Page 3 of 26, Key Activities and Dates is amended as follows (see attached revisions in underline/strikethrough):***"Tentative Dates" have been revised.***Section II, Page 6 of 26, Non-Small Business Preference is amended as follows (see attached revisions in underline/strikethrough):***"The preference to a non-small business Bidder that commits to small business or microbusiness subcontractor participation of twenty-five percent (25%) of its net bid price shall be five percent (5%) of the highest responsive, responsible bidder's total score."***Section III, Page 11 of 26, is amended as follows (see attached revisions in underline/strikethrough):***The title for the technical response format is changed to "VOLUME 2, SECTION 1, TECHNICAL RESPONSE FORMAT"***Section III, Page 14 of 26, is amended as follows (see attached revisions in underline/strikethrough):***The title for the cost bid is changed to "VOLUME 2, SECTION 2, COST BID"***Exhibit A, Form B-1, Page 2 of 5 is amended as follows (see attached revisions in underline/strikethrough):***The Employee Total for each year is amended to read "Employee Total Loaded Rate/Hr From Form A (Column F)"*

Attached are the most significant questions and answers presented at the Bidder's Conference and received in writing. Also attached is a list of conference attendees and a list of those who participated via WEBEX. Please remember that all Disabled Veteran Business Enterprise Participation Goals or Good Faith Efforts must be met.

All further questions regarding this RFP must be administrative only and directed to the Contract Officer. Except as herein amended, all other terms and conditions shall remain the same.

Sincerely,

PEG A. BERGMANN
Contract Officer

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Section I - Introduction

Key Activities and Dates

Key activities and tentative dates for this RFP are presented below:

<u>Activities</u>	<u>Tentative Dates</u>
RFP release	8-7-06
Pre-Bid Conference	8-18-06
Written Question Submittal Deadline	8-18-06
Distribute Addenda	8-24-06
DVBE Advertising	8-28-06
Deadline to submit Proposal	9-14-06/9-27-06
Interviews with Bidders	10-31-06/10-513-06
Confirmation of DVBE Commercially Useful Function	10-10-06/10-20-06
Notice of Proposed Award	10-13-06/10-23-06
Energy Commission Business Meeting	11-29-06
Agreement Start Date	1-3-07
Agreement End Date	12-31-09

How to Obtain Further Information

One Pre-Bid Conference will be held to answer questions. Please call (916) 654-4392 to confirm date, time, and location, or refer to the Energy Commission's Web Site at www.energy.ca.gov/contracts. Prospective Bidders are encouraged to attend the meeting to be held on:

August 18, 2006, 10:00 a.m. to 12:00 Noon
California Energy Commission
1516 Ninth Street, Sacramento, CA 95814

Potential Bidders may ask questions about the requirements of this RFP. Bidders may prepare their questions in writing and submit them to the Contact Person. At the option of the Energy Commission, questions may be answered orally at the Pre-bid Conference or in writing. All questions will be answered in writing and will be distributed to recipients of this RFP after the Pre-Bid Conference and posted on the Energy Commission's Web Site at www.energy.ca.gov.

To participate in the meeting using the WebEx onscreen and audio functions, please go to the following URL in your web browser on the date and time of the meeting:

[<https://energy.webex.com/energy/j.php?ED=88490557&UID=43358372>](https://energy.webex.com/energy/j.php?ED=88490557&UID=43358372)

If the link above does not work, go to: <https://energy.webex.com> and enter the meeting number:
921 016 380

When prompted, enter your information and the following meeting password:
nshp*rfp818

Provide your phone number, when prompted, to receive a call back on your phone for the audio of the workshop. Alternatively, you may call 1-866-469-3239.

Section II – Administrative Information

Disabled Veteran Enterprises

This Agreement is subject to a participation goal of three percent (3%) certified California Disabled Veteran Business Enterprises (DVBE) as set forth in Public Contract Code sections 10115, et seq.

DVBE Requirement for “Commercially Useful Function”

A certified DVBE shall provide goods or services that contribute to the fulfillment of the Agreement requirements by performing a commercially useful function.

A DVBE is deemed to perform a commercially useful function if it does all of the following:

1. Is responsible for the execution of a distinct element of the work of the Agreement.
2. Carries out its obligation by actually performing, managing, or supervising the work involved.
3. Performs work that is normal for its business services and functions.
4. Is not further subcontracting a portion of the work that is greater than that expected to be subcontracted by normal industry practices.

A contractor, subcontractor, or supplier will not be considered to perform a commercially useful function if the contractor's, subcontractor's, or supplier's role is limited to that of an extra participant in a transaction, contract, or project through which funds are passed in order to obtain the appearance of DVBE participation.

NOTE: The Contracts Office will evaluate the highest ranked Bidder's DVBE documents for compliance with the Commercially Useful Function Requirements.

Small Business/Microbusiness Preference

Government code Section 14835, et seq., requires that a five percent (5%) cost preference be given to any Bidder who is certified by the State of California as a small business for the purpose of evaluating cost bids. A Bidder who claims this preference may include a copy of its approved certification form in the Bidder's proposal.

Non-Small Business Preference

The preference to a non-small business Bidder that commits to small business or microbusiness subcontractor participation of twenty-five percent (25%) of its net bid price shall be five percent (5%) of the ~~highest responsive, responsible bidder's total score~~~~lowest, responsive, responsible Bidder's price~~.

Target Area Contract Preference

The Target Area Contract Preference Act (TACPA, Government Code Section 4530 et seq.) provides a five percent (5%) preference to California-based companies that perform State contract work in a distressed area. Bidders should complete the TACPA form Attachment if they qualify for this preference. If you have questions regarding this preference, please contact OSBCR at (916) 375-4609.

Enterprise Zone Preference Request

The Enterprise Zone Act (EZA, Government Code Section 7080 et seq.) provides an incentive for business and job development in distressed and declining areas of State. Bidders should review the EZA form Attachment to determine if they qualify for this incentive.

Section III – Proposal Format and Required Documents

Table of Contents

Each Proposal must include a Table of Contents organized in the mandatory order cited previously and with corresponding page numbers.

Required Documents and Statements

Every Bidder must complete and include the following forms with their Proposal:

1. Contractor Status Form
2. Disabled Veteran Business Enterprise (DVBE) forms (Bidders who qualify as government entities are exempt from this requirement).

Non-governmental entities must have either three percent DBVE participation *or* must demonstrate a good faith effort to obtain DVBE participation. It is important that you thoroughly read the instructions provided for DVBE requirements. To meet the DVBE program requirements, Bidders must complete and fully document at least one of the following compliance options:

Option A – Commitment to full DVBE Participation – For a Bidder who is a DVBE or who is able to meet the commitment to use identified DVBE(s) to fulfill the full DVBE participation goal.

Option B – Good Faith Effort – For a Bidder documenting its completed effort, made prior to the Bid due date, to obtain DVBE participation that may result in partial or no DVBE participation.

3. Contractor Certification Clauses
4. Summary: Summarize the Bidder's overall approach in completing the tasks outlined in the Scope of Work.

VOLUME 2, SECTION 21, TECHNICAL RESPONSE FORMAT

Approach to Tasks in Scope of Work

Describe the Bidder's approach to providing services listed in the Scope of Work, highlighting outstanding features, qualifications, and experience.

Bidder's Qualifications

Contract Management and Administrative Qualifications

Describe the Bidder's approach to contract management and administration of this Agreement. Identify the Contract Management team members. Describe where Contractor's office(s) are located and proposed methods of minimizing costs to the State. Describe where subcontractors are located and proposed methods of minimizing costs to the State.

Team Members and Relationship

Provide a short description of each firm and key members on the team. Describe the relationship between the Contractor and subcontractors on your team. Indicate any history of a working relationship between the team members noting any significant success stories.

Response To Hypothetical Situation

Bidder shall provide a full response to the Hypothetical Situation.

VOLUME 2, SECTION 2, COST BID

Cost Summary Letter

The RFP response shall state the Bidder's costs for carrying out the project as outlined during the period of the contract. The costs must be displayed using a cost cover letter on the organization's letterhead.

General Requirements

The Bidder must submit information on all the Budget forms and will be deemed the equivalent of a formal bid submission under the Public Contract Code. Rates and personnel shown must reflect rates and personnel you would charge if you were chosen as the contractor for this RFP.

The total cost for each task shall include all costs and expenses incurred by the contractor and subcontractors, if any. There will be no additional payments of any kind. In order to show how Bidders calculated task cost, Bidders must provide a detailed budget for each task listed in the Scope of Work.

Describe how you will minimize travel costs (if located out of Sacramento region). Provide the total cost of the project, with a breakdown showing how the cost was determined and method of payment. Work performed by clerical staff must be shown separately from hours calculated for project management, research, and other professional work.

The Contractor shall be reimbursed in accordance with the provisions of the contract budget. Costs must be incurred within the term of the contract. When preparing these forms, include any increases in salaries and wages, general and administrative, overhead, etc. The rates quoted in the Cost Bid will become a part of the final contract. The hourly rates bid are considered capped and shall not change during the term of the contract.

Bidders should note that in addition to names and hourly rates presented in the Cost Bid, the technical qualifications must contain the resumes of all individuals working on projects. Individual names, corresponding hourly rates, and proposed hours will be struck from the Cost Bid for resumes missing in the technical qualifications.

The following is a list of items that must be included in the Cost Summary using Budget Detail Forms in Exhibit A:

- Bidder's Direct Labor - Name, classification, and rate per hour and number of hours by task.
- Subcontractors – Name, Technical Specialty, rate per hour, and number of hours by task.
- Travel and per diem - Identify destinations, number of trips, and cost per trip. Travel expenses incurred will be reimbursed at no more than the State per diem rates for non-represented State employees, and must be included in the Cost Bid.
- Supplies/Equipment costs specifying equipment to be bought and the disposition of equipment at the end of the contract.
- Fringe benefit costs citing actual benefits or a percentage of personal services costs.
- Overhead Rate - List basis of application and all items charged in overhead
- General and Administrative - List basis of application and all items charged in G&A

**Exhibit A
Form B-1**

COST SUMMARY FORM B-1 CONTRACT LABOR COSTS											
BIDDER/CONTRACTOR:											
			Year One			Year Two			Year Three		
Identify by Task personnel by company, name, and classification			Employee Total Loaded Rate/Hr From Form B-1 A (Column F)	Hours	Labor Costs for Contract Tasks (Rate*Hrs)	Employee Total Loaded Rate/Hr From Form B-1 A (Column F)	Hours	Labor Costs for Contract Tasks (Rate*Hrs)	Employee Total Loaded Rate/Hr From Form B-1 A (Column F)	Hours	Labor Costs for Contract Tasks (Rate*Hrs)
Company	Personnel	Classification									
Task 1 - Contract Management and Reporting Requirements											
			<i>Task 1 Totals:</i>								
Task 2 - Market Research											
			<i>Task 2 Totals:</i>								
Task 3 - Campaign and Partnership Development											
			<i>Task 3 Totals:</i>								
Task 4 - Campaign Implementation											
			<i>Task 4 Totals:</i>								
TOTAL CONTACT LABOR \$											

RFP # 400-06-401
August 18, 2006, Pre-bid Conference Questions and Answers

1. The RFP states that first year funds will be dedicated to research, advertising, public relations and collaborative agreements. Will the Commission or the bidder determine how to allocate funds among these functions?
 - ***We are looking to the Contractor to decide how the budget should be allocated. The bidder's proposed budget and how it is justified is something that will be evaluated and scored during the scoring process.***
2. The RFP states that the first year budget of \$1.5 million includes advertising. Does this include creative and production costs, as well as media buys?
 - ***Yes, this is inclusive of any and all costs during the year.***
3. Does the [Energy] Commission want to focus more of its advertising efforts in a particular area (i.e. outdoor, print or broadcast advertising)?
 - ***There is no preferred advertising focus area. The Contractor is expected to make advertising recommendations upon completion of Market Research.***
4. Is there existing research on the Solar Initiative or New Solar Homes Partnership that bidders may review?
 - ***Extensive work has already been completed for the new programs. The following websites contain useful program information and links***
<http://www.cpuc.ca.gov/static/energy/solar/index.htm>
<http://www.energy.ca.gov/renewables/06-NSHP-1/index.html>
<http://www.newsolarhomes.ca.gov>
http://www.energy.ca.gov/renewables/consumer_education/index.html
5. What are the specific results that the [Energy] Commission would like to see as a result of a communications campaign? How will the [Energy] Commission measure success for this campaign? Please share specific metrics or awareness goals.
 - ***The Energy Commission is primarily focused on achieving its goal of 400 megawatts of installed PV capacity. However, periodic checkpoints will be established to evaluate if adequate progress is being made along the way. Proposals should include specific methods to evaluate the marketing program's effectiveness and provide suggestions to make changes and corrections as needed.***
6. Does the Energy Commission currently have an incumbent PR agency? If so, how long has the incumbent agency been under contract?
 - ***The Energy Commission does have its own Media and Public Communications Office. However, there is no PR agency hired to do general Energy Commission work.***
7. Is there a current incumbent for the campaign? If so, please name the agency.
 - ***No. This is the purpose of this RFP.***
8. If there is no incumbent, has the Energy Commission worked with any PR, marketing or advertising firms during the past five years as it relates to this new initiative? If so, please name the agency.
 - ***The California Solar Initiative as well as the New Solar Homes Partnership are newly approved programs and the Energy Commission has not begun any PR work for it yet.***

9. On budget form B-2, it requests the bonus value for media buys be provided. The actual bonus amount attained may be greater or less than the amount provided pending the final approved scope of work. Is it the Energy Commission's understanding that the value provided in the proposal is based on the negotiations taking place at this point and time and may change?
- ***Yes, we understand that the bonus media value in the proposal may change. However, we would hope that the proposal is consistent with the outcome of the campaign.***
10. On budget form B-1 in column F it states to take the loaded hourly rate from form B-1. We assume what is meant is the loaded hourly rate from form A. Please confirm.
- ***Yes, this was done in error and will be corrected in the addendum***
11. On budget form A, most PR, advertising and marketing agencies don't have "levels" of staff like the government title provided. Please confirm that classification refers to title and that for levels stating entry level, mid-level, and management suffices.
- ***Yes, Classification refers to the position title and Level refers to the rank of the personnel (i.e. entry, mid, and management level.)***
12. On page 11 under the Approach to Tasks in Scope of Work, please confirm that you are looking for a full work plan and timeline, not just the bidder's approach and previous experience. The scoring, on page 23, indicates that the Energy Commission is looking for detail.
- ***While the proposal is broad in outlining the scope, goals and tasks of the public awareness campaign, we are required to evaluate the proposal based on the scoring criteria in the RFP.***
13. On page 2 it states that the first year of the campaign will be a "start-up" year requiring substantial investment in research and development of campaign materials. Is it the Energy Commission's vision that no actual outreach would take place in Year I or just that a large portion of the budget and time would be spent laying the foundation for the campaign?
- ***It is critical that we launch a successful public awareness campaign in 2007. We will be looking at the proposals to evaluate the most realistic balance of market research, campaign development, implementation and partnership efforts.***
14. What portion of the budget should be allocated to providing updates to the Web site or will that task be handled internally?
- ***The Energy Commission has an award winning web team that will work with the technical staff and others on the <http://www.newsolarhomes.ca.gov> web site. The public awareness campaign materials will be adapted for the web site by the Energy Commission's web team.***
15. The RFP mentions that the target audience for the campaign will include new home buyers and builders in CA, trade organizations, industry groups and financial intuitions. It is also referenced that the Partnership is focused on providing incentives to builders to construct single family, low-income, and multifamily apartment buildings. Based on this does the Energy Commission view the target audience to be primarily low-income individuals or anyone who is likely to buy a new solar home?
- ***The primary target audience for the campaign at this time is homebuilders and new homebuyers. As we gain experience in implementing PV's on new homes, the Energy Commission will develop the program guidelines for affordable housing and multifamily dwellings and at that time we will be able to give the Contractor further direction on affordable housing. For now, the focus of this RFP response should be on new residential homes.***

16. Does an advisory group already exist and meet regularly? Reference is made to CBIA and ZEH builders.
- ***The New Solar Homes Partnership Advisory Committee is comprised of industry representatives that meet on an as needed basis. More information about these meetings and agendas can be obtained by going to: www.newsolarhomes.ca.gov and looking under NSHP Proceeding Docket 06-NSHP-1 Meetings, Workshops & Documents.***
17. Should the public awareness campaign target only the groups specified in the RFP?
- ***No, these are the suggested target audiences, and through market research other groups may be identified.***
18. Does the RFP prioritize the specified targeted audience groups?
- ***The primary target audiences are new home buyers and builders.***
19. Does the RFP require a three-year outline for the scope of work?
- ***Yes***
20. Does the RFP require a minimum length of relevant experience among team members?
- ***No, there is no requirement for minimum experience.***
21. Are there specific binding requirements for the copies of the proposal, and can each copy of the proposal be in its own envelope? Or, if they need to be bundled together, can we use a sealed box or boxes in lieu of an envelope?
- ***There are no specific binding requirements but we prefer them to be user friendly/easy to handle; however, the way a proposal is bound is not evaluated. We also prefer each copy NOT be in its own envelope. Whether an envelope or box is used is up to the bidder.***
22. Does the RFP require a narrative description for each creative sample?
- ***The RFP does not require a narrative description; however, you may attach information that describes how this sample relates to the New Solar Homes Partnership public awareness campaign.***
23. Does the RFP require a biographical narrative and separate resume for each team member?
- ***Yes.***
24. When will bidders be notified if they are to be invited to a presentation/interview?
- ***After the Evaluation Committee completes the technical and cost bid scoring. Please refer to the amended schedule in Addendum #1 of the RFP.***
25. How quickly do you want to implement the marketing campaign? (This will directly impact the extensiveness of the formative research we will propose.)
- ***The New Solar Home Partnership is expected to begin on January 3, 2007. Part of what we are looking for from the Contractor is guidance based on experience and expertise on time and specifics related to the market research time needed, research analysis and the implementation plan for the campaign. It is our expectation that we will launch the public awareness campaign in 2007.***
26. Are there any states that have implemented similar schemes that you admire as a potential model for California?
- ***While other states may have implemented Solar Photovoltaic programs for the residential sector, it is important to remember that California is unique. California's electricity system is the size of France's system. Each year nearly 200,000 new homes are being build. And our state spans all thirteen climate zones.***

A good place for federal and state specific information may be the Department of Energy's Energy Efficiency and Renewable Energy web site where there is state specific information: <http://www.eere.energy.gov/states/>

- 27.** The language of the RFP mentions that the overall New Solar Homes Partnership (NSHP) will have a particular emphasis on the production building and low-income sectors. Will there be a requirement to market specifically to these sectors?
- ***Because the majority of the program is anticipated to be production housing, staff anticipates marketing will include that sector. Staff anticipates all residential building sectors including affordable housing eventually will be targeted in some form.***
- 28.** We understand from the RFP that the Contractor will need to define deliverables and the measurements of success. However, are there any guidelines as to how the Energy Commission would like success measured?
- ***Success is 400 megawatts of solar energy on new homes in California in the next 10 years. Success is the building of positive working relationships with homebuilders, the building industry, realtors, lenders, homebuyers and other stakeholders. Success is creating a dynamic push - pull market for PV's homes in California. Success is having homebuyers and sellers understand and promote the benefits of PV's.***
- 29.** From our industry experience, we know that market barriers include supply and regulatory issues (e.g. connecting issues, net metering issues, etc.). Will the expectations of the Contractor take into consideration these barriers or will the Contractor be expected to somehow impact the market such that these barriers are overcome?
- ***The Contractor is expected to identify key barriers through education (such as interconnection processes) and provide direction on how to address ones that can be impacted through marketing efforts. However, most are outside the scope of the Energy Commission. One important concern is net metering caps. The cap will be raised with the implementation of Senate Bill 1 (stats. 2006, ch. 132, sec. 6).***
- 30.** Will the program focus exclusively on single family new construction or will it also include multifamily new construction?
- ***The Energy Commission's portion of the CSI, the NSHP, will focus on all new residential buildings. This includes new single-family developments, multi-family developments, and custom homes. The program may also include an affordable housing component that offers an additional amount over the baseline rebate.***
- 31.** Is the Energy Commission interested in targeting any geographic area with particular emphasis? If so, which area(s)?
- ***The Energy Commission anticipates future market research will determine the exact geographic area(s) targeted in California. In addition, the NSHP draft staff proposal encourages areas with climates conducive to high PV system output be targeted for installations. Therefore, it is likely regions with ample sunny conditions will be included in the campaign.***
- 32.** Is there an advertising budget for the campaign in addition to the budget for this RFP? (If so, please state what it is.)
- ***No, the contract budget is inclusive of advertising (media buys) for \$1.5 million each year.***

33. The last paragraph of page 1 states the “Target audiences for the campaign will include new home buyers and builders in California, trade organizations and industry groups, and financial institutions.” Are these targets listed in order of priority? If not, what is the order of their priority?
- ***Our main focus will be on the home builders as they will represent the vast majority of program installations. Other than that, there is no particular order as the rest are also of great importance.***
34. The first paragraph of page 2 states the goals for the campaign are to “1) educate new home buyers and builders, trade organizations and industry groups, and financial institutions on the value of new homes that incorporate high levels of energy efficiency and high performing solar systems, 2) to encourage builders to incorporate high levels of energy efficiency and high performing solar systems as standard features on new production homes, and 3) to encourage home buyers to ask for high levels of energy efficiency and solar photovoltaic systems when purchasing new production homes.” Are these goals listed in order of priority? If not, what is the order of their priority?
- ***These are not listed in any order of priority and all are of equal importance.***
35. On a scale of one-to-ten, how important is marketing “homes that incorporate high levels of energy efficiency” to this campaign?
- ***The statement “homes that incorporate high levels of energy efficiency” is representative of the fact that in order to participate in the program, homes must incorporate efficiency at levels that go beyond those set in Title 24 energy efficiency standards. This is critical to include in the campaign.***
36. To be perfectly clear, this is working with developers and potential buyers across California? The effort with low-income is separate?
- ***The outreach effort for low-income and/or affordable housing, as well as multifamily housing will not be a separate RFP or contract and will be addressed after the launch for the new production homes. For the purposes of this RFP response, please focus on new production homes. However, as the affordable housing segment of the program is launched by staff, we will work with the Contractor to research, develop and adapt outreach materials for this market segment.***
37. Will this campaign coordinate with what the CPUC will be focusing on starting in 2007?
- ***We are coordinating with the CPUC, but this contract is to work expressly on the New Solar Homes Partnership.***
38. What other solar campaigns will be going on in the state?
- ***The CPUC California Solar Initiative and Go Solar California***
39. Re: Page 13, Section III. Customer References. “Three customer references are required for each Contractor, two of which must be **current** customers.” May we submit as references from current customers those Federal and State agencies for whom we have completed environment-related communications projects during the last 3 or 4 years, since 1) we are contracted by the Federal and State governments even if not for those specific projects any more, but rather different projects at this moment in time, and 2) we are multiple awards Contractors for the Federal and State governments i.e. GSA Schedule to year 2010 and California Multiple Awards Schedule too?
- ***Yes.***
40. Re: page 14, Section III, Volume 2, Cost Bid:
- a. Direct Labor: Form A. Is it acceptable that we present Labor rates as all inclusive of Fringe benefits, Overhead, General and administrative costs and Profit, i.e. stating “0” for these latter sections? Our State and Federal rates (multiple awards contracts) are

structured in this way at their request and we do not have the breakouts readily available, and would need to construct them for this bid only.

- **No, bidders must complete this form according to the breakdown on the forms in the RFP.**

b. Travel: Please advise if you have any preconceptions for necessary Travel by the successful bidder (i.e. conferences, events)

- **There are no events planned as of yet that the Energy Commission is aware of. However, Contractors should plan on attending regular meetings at the Energy Commission (Bidders should include recommended meetings here.) Additionally, Contractors should plan on attending at least two other conferences/meetings here at the Energy Commission.**

c. Re: Form B-2, if we are awarded the bid, with your approval, may we adjust the line item figures to match the eventual strategic and media plan which will be developed during the scope of work, so long as we do not exceed the total amount?

- **The Contract Manager has the ability to approve movement between line items up to 10% of the total contract amount without needing to go forward with a formal contract amendment.**

d. Re: Form B-2, do you object to us including a mark-up on the net cost of approved purchases within the budget amounts to be listed here, as a source of income to us in this contract?

- **We are only able to reimburse for actual costs as reflected in the receipts submitted with invoices. Please refer to Attachment 5, Exhibit B.**

41. Ref. Page 24, 8. Cost Summary:

a. Do we understand correctly that you will evaluate favorably a Cost Bid / Summary and Form C which demonstrates the best utilization of the entire budget available, i.e. \$1.5 million per year for 3 years, instead of favoring a bidder who proposes the lowest amount?

- **The bidder with the overall highest score in the Technical, Cost, and Interview/Presentation sections of the proposal is expected to be awarded the contract. However, the Energy Commission reserves the right to cancel the RFP, amend the RFP, or reject any or all proposals received in response to the RFP. The Evaluation Committee may reject all proposals if none are considered in the best interest of the Energy Commission regardless of the scores.**

b. Ref Cost Summary "e": "Demonstrates a policy to reduce the standard advertising agency commission from 15% in the proposed budget." Please explain what you mean by "policy". Do you favor an advertising agency which reduces or eliminates agency commission as a source of income combined with its labor rates, i.e. most strongly favoring an agency which earns all income from its labor, contrary to common industry practice?

- **State agencies are required to seek ways to reduce costs. In various state public awareness campaigns, a reduction in the agency's print and advertising commissions has been a successful way to reduce the state's costs. The Energy Commission is looking to similar approaches by bidders.**

42. Has the Energy Commission carried out any primary or secondary marketing research of new homebuyers and homebuilders as relates to their utilization of solar power and the challenges and opportunities of this RFP, and if so, may we have copies of the reports? Can you recommend reports of such marketing research, carried out by others?

- **The Energy Commission has not conducted any marketing research on new homebuyers/builders.**

43. Has the Energy Commission utilized consultants for significant marketing communications projects in the recent past, and if so, what are their names, names of projects, SOW briefly stated, and approximate dates and budgets?
- ***There have been no significant marketing communications projects in over five years. This Public Awareness Campaign is different than any previous projects.***
44. Please confirm that the contract will be awarded to the highest scoring firm (Technical and Presentation) which meets all the requirements of the RFP.
- ***As stated in the answer to question #41, the bidder with the overall highest score in the Technical, Cost, and Interview/Presentation sections of the proposal is expected to be awarded the contract. However, the Energy Commission reserves the right to cancel the RFP, amend the RFP, or reject any or all proposals received in response to the RFP. The Evaluation Committee may reject all proposals if none are considered in the best interest of the Energy Commission regardless of the scores.***
45. Detail: On page 5: 'Number of Copies to Submit ...The Bidder must submit the original and copies in a sealed envelope labeled "Title and RFP # here".' Should the label say "PROPOSAL FOR NEW SOLAR HOMES PARTNERSHIP PUBLIC AWARENESS CAMPAIGN, RFP #400-06-401"?
- ***Yes.***
46. Could you please clarify whether or not 501(c)3 nonprofit organizations are eligible to submit proposals for the New Solar Homes Partnership Public Awareness Campaign (RFP #400-06-401)?
- ***Yes, they are eligible.***
47. How should the cost proposal information be submitted? Does it need to be in a separate sealed envelope from the technical proposal?
- ***No, this RFP will not be chosen on a low-bid basis. The cost proposals will be scored along with the technical proposals.***
48. Is the Energy Commission/NSHP expecting mock up creative work to be submitted as part of the technical proposal?
- ***The Energy Commission is looking for examples of past and current creative work, as described under Section III of the Proposal Format and Required Documents.***
49. Is the Energy Commission/NSHP expecting an actual tailored/negotiated media plan to be developed as part of the proposal submission, as outlined in the Technical Evaluation Criteria, 1.a, page 23/26? Or, can bidders supply rationale for a proposed method, assuming that a full and negotiated for best rates media plan would be developed upon award of the contract?
- ***The Energy Commission is looking for a proposed creative and compelling marketing plan, which furthers and complements the current New Solar Homes Partnership activities, goals, and objectives.***
50. Should bidders provide an implementation timeline for all activities proposed for the duration of the three year contract?
- ***Yes.***
51. What is meant by "an assessment of what market data is available" as referred to on page 18/26 under task 2 Market Research?
- ***There are other existing programs that have incorporated photovoltaic systems into new home construction. In addition, there is publicly available information and studies on market barriers to widespread acceptance of photovoltaic systems for homebuyers. The Energy Commission's Public Interest Energy Research***

program has worked with the Department of Energy and new home builders in funding Zero Energy New Homes, which are homes that are extremely energy efficient and use photovoltaic systems. Information on this program may also be useful for implement the NSHP. We do not want to reinvent the wheel and prefer to use existing materials first before we duplicate research.

52. If the initial start date of the contract is not until Jan 07, should it be assumed that the preliminary contract budget of \$1.5 million must be spent by fiscal year end, June 07, with subsequent budget years actually being July 07-June 08 and July 08-June 09 and July 09-December 09? Or do fiscal year budgets not apply to this particular contract term?
- ***Currently, the budget for this contract is continuously appropriated (meaning it takes on whatever the current FY is). Therefore, once monies are encumbered into the contract, we have through the term of the contract to liquidate it. The Energy Commission will encumber \$1.5 million into the contract for the first year's budget as soon as the contract is executed and if the Energy Commission decides to amend the contract to extend it, additional monies will be encumbered into the contract at that time (up to \$1.5 million per calendar year.) However, this is also dependent upon several factors which could impact our program funding.***
53. What will be the criteria used to determine "Value of bonus media (dollar equivalent) (Form B-2)." Under section 7. Overall Value of Project of Section VI: Evaluation Criteria?
- ***The Value of Bonus media (Dollar Equivalent) form B-2 will be evaluated under 7b on the Evaluation Criteria, Section VI of the RFP.***
54. Under Attachment 5, Exhibit B "invoice certification" - The following certification shall be included on each invoice and signed by an authorized official of the Contractor – who is considered to be an "authorized official of the Contractor"? Must this be an officer of a Contractor, or can it be the contract manager?
- ***This must be someone in your company/organization who is identified as having the authority to approve invoice payables.***
55. What are "match fund expenditures" as outlined in Exhibit B Invoicing Procedures?
- ***Match Funds means cash or in-kind (non-cash) contributions provided by Contractor, subcontractors or other parties that will be used in performance of this Agreement.***
56. Page 7/23, Attachment A, #2, Budget Contingency Clause states "It is mutually agreed that if the Budget Act of the current year and/or any subsequent years covered under this Agreement does not appropriate sufficient funds for the work identified in Exhibit A, this Agreement shall be of no further force and effect. In this event, the State shall have no liability to pay any funds whatsoever to Contractor or to furnish any other considerations under this Agreement and Contractor shall not be obligated to perform any provisions of this Agreement" – if budgets are cut during a campaign year, does this mean that the State will not compensate Contractors for work conducted prior to the budget cut?
- ***No, invoices received for work already performed will be paid unless there is an invoice dispute.***
57. What is considered to be an "equipment invoice" as referenced in Attachment 5 "Retention"?
- ***The Energy Commission is required to hold retention on services. We do not hold retention on equipment purchases. Invoices for equipment purchases are is paid in full upon receipt of an invoice (unless there is an invoice dispute which must be handled on a case-by-case basis.)***

58. Prioritize the key audiences for us. You list producers, homebuilders, local communities, businesses and other entities? Which ones are most important to you? Additionally, please define the "other entities" for us.
- ***The bidder should propose priorities for the various entities and substantiate the prioritization.***
59. You need to reach a target by 2017 but the US Department of Energy's Solar America Initiative says that advanced PV (photo voltaic) materials won't be cost-competitive with other forms of renewable electricity until 2015. How are you aligning this with your 2017 goal if the next generation is not cost effective for builders?
- ***The State of California is offering incentives to bridge the gap between current PV costs and cost effective PV. By 2017, it is envisioned that incentives will not be required, which appears to be consistent with the Department of Energy's Initiative.***
60. Do you have a search engine optimization strategy?
- ***No.***
61. Please explain/describe the \$350 million in financial incentives you plan to provide. How are you doing this, how much per year and who is the target? You also mentioned this sum includes non-financial assistance in builder and marketing support to help create a self-sustaining market for new solar homes starting in 2007. What is the non-financial assistance?
- ***The exact incentive has not been decided yet. The starting incentive for 2007 may be similar to the current \$2.60/watt rebate, and is anticipated to decline until it is zeroed out on or before 2017.***
 - ***The NSHP is planning to provide technical training assistance to home developers, building departments and permitting authorities.***
62. What other programs do you have underway at the moment that are focused on the homebuilders and on single-family, low income housing? How do you plan to coordinate these programs and point of contact?
- ***The Energy Commission's current Emerging Renewables Program, described on the Energy Commission's website: www.consumerenergycenter.org, provides rebates to all eligible customers in four electric utility service areas. Eligible customers also include new homes, and affordable/low income housing. After January 1, 2007 the Energy commission's program will focus on new homes and affordable housing.***
63. How is this program expected to coordinate with the overall CSI brand development with the CPUC side of CSI?
- ***The Energy Commission is and will continue to coordinate with the CPUC. The Contractor should plan to focus primarily on the New Solar Homes Partnership.***
64. Will a firm involved in this work be considered to be involved in "implementation" and therefore be precluded from bidding on evaluation work on all [Demand Side Management] DSM programs?
- ***This will be handled on a case-by-case basis should the situation arise. It would depend on what work the Contractor or Sub-contractor is doing under the contract resulting from this RFP.***
65. Is program design for the ultimate Solar New Homes program part of this campaign budget?
- ***This RFP is for the design and implementation of the public awareness campaign. Program design is being handled separately.***

66. Will there be a separate RFP for program implementation? Will that program be required to manage the incentives recommended under this budget? Or are those activities expected to be under this program?
- **Implementation and administration of the NSHP Incentive program will be handled separate from this contract.**
67. Will the winning bidder be expected to recruit and track builders for this program?
- **No, there are technical staff working on developing partnerships with stakeholders as this is an important component to the campaign. However, we are interested in input from the Contractor on additional approaches to encourage partnerships. Additionally, the purpose of the public awareness campaign is to educate builders, developers and home-buyers on the advantages of solar and higher efficiency homes. So the Contractor will be directly involved in builders and developers planning to build more solar/efficient homes and more home buyers seeking solar homes.**
68. I assume the "Standard Agreement" (attachment 5, pages 43-65) must be included with the final proposal even though it is not listed with the other required documents. Correct?
- **No. The winning bidder will be sent the Standard Agreement to review and sign once it has been approved by the Energy Commission.**
69. Can we submit letters of endorsement from non clients? If so, in what form should these references be submitted?
- **If the letter is relevant to this campaign, it may be submitted. Since the RFP does not specifically address this, we are not able to provide information regarding format requirements.**
70. Can the total 3-year budget be divided up in uneven increments? Specifically, can unused portions of the year-1 budget be allocated and carried over to years two and three when creative development and advertising buys may exceed \$1.5 million?
- **Bidders should propose a budget based upon their proposed workplan and timeline. Unused portions of the funding may be "carried over" into subsequent years.**
71. Can CEC give examples of policies used in prior contracts that can reduce specific costs to the state?
- **We do not have specific policies, we want bidders to present ideas in this area as part of their proposal.**
72. Do the funds stated in the RFP represent the total amount of CEC funds that are available for implementing the campaign?
- **Correct. There is a total of up to \$4.5 million available for this contract. A maximum of \$1.5 million is available for the first year of the contract, and up to \$1.5 million is available for each of two additional years if the contract is extended in the Energy Commission's discretion.**
73. Is there an income range for the consumers to be targeted in this proposal? What are the consumer demographics?
- **The target audience is new home buyers and new home builders. The demographics of these groups may vary geographically. We anticipate that this will be explored in the market research component of the contract.**

- 74.** Has the CEC identified specific markets, and do they have suggestions for which markets are most pertinent to the success of the CSI (areas with peak solar demand, for example?)
- ***At this time we have not identified specific geographic markets. This may evolve from the partnership relationships, the stakeholder group, and/or the market research***
- 75.** Other than the 14 September submission deadline, what other deadlines apply, as referenced on the website?
- ***Please refer to the revised key activities and dates for this RFP, as provided in Addendum #1 of the RFP.***
- 76.** Will a state subsidy exist for solar installation to reduce cost barriers at the consumer level? If so, what is the range of that subsidy?
- ***There will not be a separate rebate for both the builder and for the consumer. While the NSHP targets new home development, custom homes will be included as well. In the case of custom homes it is anticipated the rebate will reduce the cost of system installation to the end use consumer and therefore lower the cost barriers. The CSI will also directly lower the system cost for consumers. The rebate amount is still being determined but could start around \$2.60/Watt (the current rebate level under the Energy Commission's Emerging Renewable Program), and would be expected covers around 25% of total system cost. The rebate will decline over the course of the program. (Peg, I revised this answer so it is consistent with Q. 61.)***
- 77.** What is the incremental cost for a solar home as opposed to a non-solar home?
- ***We anticipate that it will cost less for builders to install systems on new production homes than the current cost of retrofitting an existing home with a photovoltaic system. The cost varies depending on the size of the system. The typical system on a new development home is 2-3 kW with a net cost after rebates/incentives of about \$15,000 to \$30,000. However, cost varies greatly with installation type and system size. It is anticipated the cost will decline with greater market uptake.***



California Energy Commission

New Solar Homes Partnership Public Awareness Campaign

California Energy Commission
Request for Proposals
RFP #400-06-401
Pre-Bid Conference
August 18, 2006



Proposal Requirements

- REQUIRED FORMAT FOR PROPOSAL RESPONSE
- Consists of Two Volumes
- VOLUME 1 – Administrative Response
- VOLUME 2 – Technical Response and Cost Summary



Volume 1

Administrative Response

Every Proposer must complete the following forms in Volume 1, Administrative Response.

- Cover Letter
- Table of Contents
- Contractor Status Form
- Small Business Preference Certification (if applicable)



Volume 1, Administrative Response (Con't)

- Completed DVBE forms
- Signed Certification Clauses
- Target Area Contract Preference Act Forms (if applicable)
- Enterprise Zone Act Forms (if applicable)
- Local Agency Military Base Recovery Act Forms (if applicable)



Volume 2, Technical Response

Vol. 2, Section 1 – Technical Response

- Approach to Tasks in Scope of Work
- Bidder Qualifications
- Cost Minimization
- Team Qualifications and Relationships
- Team Member Experience and Qualifications
- References
- Examples of Current and Prior Work
- Response to Hypothetical Situation



Volume 2 – Cost Summary

Vol. 2, Section 2 – Cost Summary

- Cost Summary Letter
- General Requirements
- Form A, Labor Rates
- Form B-1, Contract Labor Costs
- Form B-2, Direct Costs
- Form B-3, Travel Worksheet
- Form C, Proposed Contract Budget



Disabled Veteran Business Enterprise (DVBE) Requirements

TWO Options for Proposers:

Option A, full DVBE participation (3% of total Agreement amount)

Option B, Good Faith Effort - partial DVBE participation or no DVBE participation



DVBE (cont'd)

Option A – Commitment

Proposer commits to meet or exceed the DVBE participation requirements by either of the following methods:

Method A1 – Proposer is a Certified DVBE

Method A2 – Subcontractor is a Certified DVBE and will receive at least 3% of the Agreement amount



DVBE (cont'd)

Option B, Good Faith Effort (no DVBE participation)

Perform and document the following steps 1-5:

Step 1 – Contact the Energy Commission's Contracts Office for DVBE information

Step 2 – Contact other State and Federal Agencies, and Local Organizations



DVBE (cont'd)

Step 3 –Advertise at least 14 calendar days prior to proposal due date in both a trade paper and a DVBE focus paper. If the paper is dual purpose and fulfills both requirements, only one ad is required. When submitting a proposal:

- Proposer must provide the publication name, contact name and phone number, and date ad was placed
- Proposer must submit ad copies



DVBE (cont'd)

Step 4 - Invitations to Participate

- Invite (solicit) DVBEs who provide relevant services to the Agreement
- Document completed contacts and submit copies of each invitation and copies of confirmation of fax transmittal or delivery
- Proposals are considered non-responsive if copies of invitations are not submitted with the proposal



DVBE (cont'd)

Step 5 – Consider all DVBEs who respond to an invitation based on the Agreement needs, document DVBE firm(s) selected and document reasons for any firm(s) not selected.



DVBE (cont'd)

A copy of an Agreement between the Contractor and the DVBE must be submitted prior to contract award. The Agreement may be in draft form but must show that the DVBE meets the Commercially Useful Function requirements as defined in the RFP.



Tentative Key Activities and Dates

- August 24, 2006 - Distribute Questions & Answers
- August 28, 2006 - DVBE Advertising Deadline
- September 14, 2006 - Proposals due by 5:00 PM (no exceptions)
- October 3-5, 2006 - Presentations/Interviews with Bidders
- October 10, 2006 - Confirm DVBE Commercially Useful Function
- October 13, 2006 - Notice of Proposed Award
- January 3, 2007 / December 31, 2009 - Term of Agreement



New Solar Homes Partnership Overview

- On January 12, 2006, Governor Schwarzenegger's California Solar Initiative (CSI) was approved by the California Public Utilities Commission to install 3,000 megawatts of solar capacity in California by 2017.
- This action created a \$2.8 billion ten-year joint California Energy Commission and California Public Utilities Commission solar incentive program.
- The Energy Commission will manage \$350 million to fund incentives and rebates for new residential home construction with a goal of installing 400 megawatts of new solar capacity.



New Solar Homes Partnership Overview

California Public Utilities Commission (CPUC)

California Solar Initiative program (CSI)

- Existing Residential Buildings
- Commercial buildings
- Industrial facilities
- Agricultural facilities
- Low-income/Affordable Housing



New Solar Homes Partnership Overview

California Energy Commission (CEC)

New Solar Homes Partnership (NSHP)

- New Residential Buildings
 - Single Family Homes
 - Low-income/Affordable Housing
 - Multi-family apartments
- Energy Commission will specifically target and work with the builder and developer communities



Campaign Goals

The goals of the public awareness campaign are three-fold:

- 1) Educate new home buyers and builders, trade organizations and industry groups, and financial institutions on the value of new homes that incorporate high levels of energy efficiency and high performing solar systems.
- 2) To encourage builders to incorporate high levels of energy efficiency and high performing solar systems as standard features on new production homes.
- 3) To encourage home buyers to ask for high levels of energy efficiency and solar photovoltaic systems when purchasing new production homes.



Scope of Work

Four Task Areas

1) Contract Management and Reporting

- Monthly Reports
- Final Report

2) Market Research

- Identify California home buyers who will purchase solar PV homes
- Encourage home builders to incorporate solar PV systems in new home developments
- Focus Groups



Scope of Work (continued)

- 3) Campaign and Partnership Development
 - Educational and Marketing Plan Development

- 4) Campaign Implementation
 - Media Placement
 - Media Measurement



Questions and Answers

Question and Answer Session



Whom to Contact?

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Session detail for "New Solar Homes Partnership Public Awareness Campaign Pre-Bid Conference":

Participant Name	Email	Start time	End time	Duration
1 Amy Morgan	amorgan@energy.state.ca.us	9:37 AM	11:22 AM	106 mins
2 Amabelle Camba	amabelle@brownmillerpr.com	9:42 AM	11:20 AM	99 mins
3 A_RECORDING_PC	tfong@energy.state.ca.us	9:49 AM	11:20 AM	91 mins
4 Lisa Smith	LSmith@energycoalition.org	9:50 AM	11:21 AM	91 mins
5 Submit Questions Here	dnguyen@energy.state.ca.us	9:51 AM	11:23 AM	92 mins
6 Kati Schmidt	kati.schmidt@bm.com	9:54 AM	11:19 AM	86 mins
7 heidi hayes	heidi@agency2.com	9:54 AM	11:29 AM	95 mins
8 stephanie	stephanie@swirl.net	9:54 AM	11:29 AM	95 mins
9 Alexis Goubran	alexis.goubran@hillandknowlton.com	9:54 AM	11:29 AM	95 mins
10 Britta Franson	bfranson@webershandwick.com	9:57 AM	11:20 AM	83 mins
11 Nichole Kezsely	nichole.kezsely@alconemarketing.com	9:59 AM	11:20 AM	81 mins
12 michelle morin-machi	michellem@wolfedoyle.com	9:59 AM	11:29 AM	90 mins
13 Lauren Martindale	lmartindale@fypower.org	9:59 AM	11:29 AM	90 mins
14 Mark Stimson	mstimson@riovertotech.com	10:01 AM	11:25 AM	85 mins
15 Linder Allen	linder.allen@gmail.com	10:02 AM	10:09 AM	7 mins
16 Anne Staines	anne@proprose.biz	10:03 AM	11:21 AM	78 mins
17 Denise Hitchcock	spindctr@earthlink.net	10:03 AM	11:22 AM	79 mins
18 Jack Lloyd	jack_lloyd@marketstrategies.com	10:03 AM	11:29 AM	86 mins
19 Michelle Vega	michelle.vega@edelman.com	10:04 AM	11:29 AM	85 mins
20 Craig Savage	csavage@buildingmedia.com	10:04 AM	11:24 AM	81 mins
21 Terri Kaufman	tkaufman@cadmusgroup.com	10:05 AM	11:22 AM	78 mins
22 Claudia Ponder	cponder@socal.rr.com	10:06 AM	11:21 AM	75 mins
23 Matt Kolbert	mkolbert@panagraph.com	10:08 AM	11:08 AM	61 mins
24 Derek Wilksen	derek@riechebaird.com	10:08 AM	11:29 AM	81 mins
25 Tom Geldner	tom.geldner@sdenergy.org	10:10 AM	11:29 AM	79 mins
26 webteam2	media@energy.state.ca.us	10:10 AM	10:17 AM	7 mins
27 Linder Allen	linder.allen@gmail.com	10:12 AM	11:24 AM	72 mins
28 anon	agency@agency2.com	10:18 AM	11:21 AM	63 mins
29 Jake Reyes	jaker828@gmail.com	10:26 AM	10:40 AM	14 mins
30 Nia Crowder	nia@therobertgroup.com	10:30 AM	10:44 AM	14 mins
31 Nia Crowder	nia@therobertgroup.com	10:50 AM	11:27 AM	37 mins
32 Jake Reyes	jaker828@gmail.com	11:15 AM	11:20 AM	6 mins
33 Claudia Ponder	cponder@socal.rr.com	11:22 AM	11:22 AM	1 min

Company	Title	Phone Num	Address 1	Address 2	City
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State/Provi Zip/Postal | Country/Region